



## Investments Case Study: Diversification

**I'd always been interested in investments , although was looking for a solution that would enable me to diversify my portfolio and take advantage of specific opportunities - without 'betting the farm'.**

**I wanted to provide input on specific asset classes, although knowing life can often get too busy, I needed to trust my portfolio would be managed expertly.**

Clifford has advised me for over 15 years. From the outset he has impressed me with his genuine enthusiasm, as well as his understanding and clear communication of the analytical risks and rewards of investment.

Using the Fish Investment Process, Cliff advised me to consolidate my pension and investments into a single strategy, with the flexibility to invest in both core and non-traditional asset classes.

My consolidated pension and investment holdings are now invested in a single flexible strategy, aligned to the level of risk I am willing to accept. Using Fish, my diversified portfolio is proactively invested in equities and fixed interest, as well as wider opportunities such as commodities like energy and precious metals.

I like the fact that my Fish portfolio is actively managed. The level of risk and mix of asset classes is reviewed quarterly, while a team of over 100 analysts at SEI provide daily monitoring for my equity and fixed income holdings.

Having always been interested in investments I like the flexibility of being able to have as much or as little input as I wish. I know that no matter what, I can trust the team at Fish Financial to manage my portfolio expertly, and within a risk-controlled way.

Another added benefit is online access to my account 24x7 and quarterly jargon-free performance reviews and updates. Now I feel totally involved and in control.

**"One of the biggest changes since switching to Fish Financial has been the level of reporting and reviews we receive - I really feel involved in the process of monitoring my investments and finally I understand why we make changes. It's just refreshing to be part of the team"**

Steve Green, Osteopath